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Report of the United Nations Office on Drugs and Crime

Note by the Secretary-General

The Secretary-General has the honour to transmit to the Statistical Commission the report of the United Nations Office on Drugs and Crime on statistics of drugs and drug use. The report is transmitted to the Commission in accordance with a request of the Statistical Commission at its thirty-fourth session.** The Commission may wish to take note of the work of the Office on Drugs and Crime in the area of statistics of drugs and drug use.

* E/CN.3/2004/1.

** See *Official Records of the Economic and Social Council, 2003, Supplement No. 4* (E/2003/24), chap. I.A.

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Statistics of drugs and drug use

Report of the United Nations Office on Drugs and Crime

Summary

The present report is a summary of the 2003 edition of the annual statistical publication of the United Nations Office on Drugs and Crime, *Global Illicit Drug Trends*, which can be downloaded from http://www.unodc.org/unodc/en/global_illicit_drug_trends.html, bought in United Nations bookshops, or ordered from the United Nations Office on Drugs and Crime.

This summary presents, first, an analysis of the main illicit markets for heroin, cocaine, cannabis and amphetamine-type stimulants and, secondly, synthesizes the main trends in illicit drug production, trafficking and consumption. The analysis of the main illicit markets focuses on the period from 1998 to 2002, since the international community is presently reviewing progress in achieving the targets set at the twentieth special session of the General Assembly, held in 1998. The consideration of illicit drug production, trafficking and consumption trends focuses on 2001 and 2002.

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I. Main trends in illicit drug markets, 1998-2002

1. The evolution of the main illicit drug markets in recent years provides an uneven picture of positive and negative developments, depending on the drugs and the regions considered. Overall, the evolution of world heroin and cocaine markets shows some positive tendencies. The picture is confused for synthetic drugs and fairly negative for cannabis.

A. Heroin

2. Treatment data consistently show that illicit heroin use has the most severe health consequences for drug abusers. The United Nations Office on Drugs and Crime estimated that in 2000-2001 about 15 million people in the world abused opium and heroin. Although this figure has not changed much since the late 1990s, gaps in the data prevent precise monitoring of changes in global demand for illicit opium and heroin from year to year. The impression of the relative stability of the global heroin market since the end of the 1990s can be supported by an assessment of the supply situation, for which there is more robust data. About 4,400 metric tons of illicit opium were produced in 1998. Four years later, in 2002, the production (approximately 4,500 metric tons) is more or less at the same level. Underneath the apparent stability of global production, however, major shifts are at work.

3. Statistics on agricultural land devoted to illicit opium poppy cultivation in the world show that the market is changing. While global opium production remained basically stable over a four-year period, illicit opium poppy cultivation declined by 25 per cent. The answer to this apparent paradox can be found in a considerable shift of production from South-East to South-West Asia. Progress made in Myanmar and the Lao People's Democratic Republic resulted in a 40 per cent reduction in the area under opium poppy cultivation in that region between 1998 and 2002. This downward trend continued in 2003. If the current rate of reduction in South-East Asia is sustained, the Golden Triangle could well become a minor source of illicit opium in the next few years. This would close a century-long chapter in the history of drug control. Meanwhile, a 16 per cent increase was recorded in South-West Asia from 1998 to 2002. The higher productivity of the irrigated opium fields in Afghanistan explains why the world's opium output remained stable while the level of cultivation was going down. The result has been an increasing concentration of illicit opium production in a single country, Afghanistan.

4. Regional shifts have also reshaped the patterns of heroin abuse in the world. There are some improvements in Western Europe, but the rapid growth of opium production in Afghanistan has fuelled the development of a large heroin market in the region and, further, in Central Asia, the Russian Federation and Eastern Europe. Caused largely by the increase in intravenous heroin abuse, the HIV/AIDS epidemic has been expanding at an alarming rate.

5. The new heroin markets in Eastern Europe, the Russian Federation and Central Asia are not yet as lucrative as the Western European markets. The economic incentive they provide to traffickers is thus lower. They do, however, offer the potential to offset the reduction in profitability per transaction by expanding the consumer base. There are already more opiate abusers in those regions than in Western Europe, and the potential for further growth is large.

6. There is evidence to suggest that the effect of long-term demand reduction efforts can be catalysed by rapid and shorter-term progress in the reduction of supply. Although stocks delayed and reduced the impact of the short-lived but considerable decline of opium production in Afghanistan in 2001, records show that heroin purity levels in Europe declined that year and that the trend continued in the first two quarters of 2002. One positive consequence was a decline in the number of drug-related deaths in a number of Western European countries. Similarly, there are indications that in the countries of Central Asia the growth of abuse declined markedly in 2002 as a consequence of reduced supply. Australia provided another illustration. Following the dismantling of a number of trafficking groups supplying the Australian market, the availability of heroin in that country dropped significantly in 2001. As a result, declines in the number of drug-related crimes and drug-related deaths, as well as increases in the number of heroin addicts seeking treatment, were recorded. In 2003, however, there have been reports of the supply slack in Australia being partly taken up by heroin originating in, or being trafficked via, the Democratic People's Republic of Korea.

B. Cocaine

7. Cocaine is abused by about 14 million people in the world and comes second to heroin in terms of treatment demand. There are some signs of progress in controlling cocaine supply and demand. Of the three countries that supply the world's illicit cocaine, Bolivia has now become an almost marginal source (less than one tenth of world cocaine production), and Peru has achieved a reduction of about 60 per cent in coca cultivation since 1995. Although both countries are encountering difficulties in consolidating the decline and eliminating the remaining illicit cultivation on their territory, overall they have not produced more than one fifth of the world's illicit cocaine during the past few years.

8. The main challenge is Colombia, where the production of cocaine from domestic cultivation increased roughly by a factor of five between 1993 and 1999. By then the country had become the source of almost three quarters of the world's illicit cocaine. The good news is that, reversing an eight-year trend, and for the second year in a row, Colombia achieved a very significant reduction of coca bush cultivation on its territory in 2002. Cumulatively, this amounts to a 37 per cent decline between 2000 and 2002. Combining the three source countries translates into an overall reduction of 22 per cent of the area under coca cultivation between 1999 and 2002. If this trend persists there could be a major change in the dynamics of world cocaine supply.

9. At the other end of the trafficking chain, some positive evidence is available. In the United States of America, the world's largest cocaine market, student surveys show that the number of cocaine users has tended to stabilize in recent years. Annual prevalence figures for 2002 in that country were reported to be 15 per cent lower than in 1998, and some 60 per cent lower than in 1985.

10. Nonetheless, there is some cause for concern on the demand side in other regions. Cocaine abuse is increasing in South America, and cocaine traffickers have been finding new market outlets in Europe. As in the case of heroin, there are indications of a shifting market. Although the bulk of cocaine trafficking is still in the Americas, there has been an increase in cocaine trafficking towards Western

Europe. The share of global cocaine seizures in Western Europe more than doubled between 1998 and 2001, rising from 8 per cent to 17 per cent during that period. Information on consumption tells the same story. The majority of Western European countries reported an increase in cocaine abuse for 2001.

C. Cannabis

11. Cannabis continues to be the most widely produced, trafficked and consumed illicit drug worldwide.

12. Given the global spread of cannabis production and the virtual absence of monitoring systems, no reliable production estimates for cannabis are available. (In Morocco, which is one of the largest producers of cannabis resin, the United Nations Office on Drugs and Crime and the Government are launching the first survey of cannabis cultivation this year.) Rising levels of cannabis seizures and abuse suggest, however, that production is also increasing.

13. About two thirds of the 86 countries that reported cannabis consumption trends to the United Nations Office on Drugs and Crime last year indicated an increase of cannabis abuse in 2001. Overall seizures of cannabis rose by some 40 per cent between 1998 and 2001.

14. A distinction should be made between cannabis resin and herb products. Seizure data over the period 1998-2001 suggest a relative stability in the trafficking patterns of cannabis resin, which continues to be seized primarily in Western Europe (about three quarters of all seizures). It was therefore cannabis herb seizures that accounted for the increase noted above. More than 60 per cent of all cannabis herb seizures in 2001 were reported from the Americas. However, the strongest increase was in Africa, probably reflecting a combination of large-scale cultivation of cannabis and increased enforcement efforts in recent years. More than a quarter of all cannabis herb seizures are now reported from countries in Africa, compared with little more than 10 per cent in 1998-1999.

15. Finally, seizures of cannabis plants — an indicator of the efforts made by Governments to eradicate cannabis fields — seem to be declining, possibly an indication of the lesser priority given to cannabis eradication by some Governments.

16. There are, however, some positive trends. In the United States of America, for instance, cannabis abuse (annual prevalence) fell in 2002 among high-school students and was almost 10 per cent lower than in 1997 and some 30 per cent lower than in the late 1970s. In Australia, cannabis abuse among the general population declined by 23 per cent over the 1998-2001 period.

D. Amphetamine-type stimulants

17. Amphetamine-type stimulants (ATS) are synthetic drugs that include the chemically related amphetamine, methamphetamine and ecstasy. Unlike the traditional plant-based drugs, the production of ATS starts with readily available chemicals, in easily concealed laboratories. This makes an assessment of the location, extent and evolution of the production of such illicit drugs extremely difficult. In order to obtain a clearer picture of this complex situation, the United

Nations Office on Drugs and Crime is presently undertaking a global survey on ATS.

18. Seizures of laboratories and end products, as well as reports on consumption, indicate that the expansion of the ATS market is continuing. More laboratories were detected and dismantled worldwide over the last few years than ever before, particularly in the United States of America. But the market is also changing, partly in response to drug control agencies' efforts to tackle the problem, and partly as a result of the dynamics of abuse patterns.

19. Trafficking in methamphetamine accounts for the bulk of trafficking in ATS and has been clearly shifting towards East and South-East Asia in recent years. Seizures in 2001 declined, however, possibly a consequence of better controls of ephedrine (one of the main precursors) and first successes in reducing methamphetamine production in China. The Democratic People's Republic of Korea seems to be emerging as a significant source and trans-shipment area for methamphetamine going to Japan, which is the region's most lucrative ATS market.

20. In 2000 close to 90 per cent of all countries reporting to the United Nations Office on Drugs and Crime on trends in the abuse of methamphetamine reported an increase. By 2001 this proportion fell to 52 per cent. Japan reported a stabilization in methamphetamine abuse in 2001, following years of increase. Thailand, in contrast, affected by large-scale methamphetamine imports from neighbouring Myanmar, seized the largest quantity of methamphetamine worldwide in 2001 and reported a further increase in ATS abuse for 2001.

21. Europe, notably the Netherlands, Poland and Belgium, continues to be the main centre of clandestine amphetamine production. Seizures of amphetamine in Western Europe peaked around 1998 and have shown a downward trend since, but production and trafficking continued to increase in Eastern Europe. This could signal an underlying shift of amphetamine production to Eastern Europe, and possibly a less buoyant demand in Western Europe. While half of all Western European countries reported an increase in amphetamine abuse in 2000, this proportion fell somewhat, to 33 per cent, in 2001.

22. Trafficking in ecstasy increased strongly throughout the 1990s. In 2001, however, ecstasy seizures declined, mainly in North America and Western Europe. Europe (particularly the Netherlands and Belgium) is still the main centre of global ecstasy production. However, its relative importance seems to be declining as ecstasy production is appearing in other parts of the world. In the mid-1990s, Western European countries reported about 80 per cent of all ecstasy seizures. This proportion fell to about 50 per cent in 2000 and 2001. Trafficking in ecstasy has increased particularly in the Americas in recent years, though it is now found in other regions as well, notably in South-East Asia, southern Africa and the Near and Middle East.

23. Ecstasy abuse, after a period of decline, has again shown signs of increase in Western Europe. In the United States of America it declined, for the first time in years, in 2002. In other regions, particularly the Caribbean and parts of South America, Oceania, South-East Asia, the Near East and southern Africa, it seems to be accelerating.

II. Main trends in production, trafficking and consumption, 2001-2002

A. Production

1. Opium/heroin

24. After the steep decline recorded in 2001, world illicit opium and heroin production recovered in 2002, despite a reduction of cultivation by 23 per cent in Myanmar and 18 per cent in the Lao People's Democratic Republic. This increase was due to the resumption of large-scale opium poppy cultivation in Afghanistan. Global illicit opium poppy cultivation (see figure 1) climbed back to about 180,000 hectares in 2002 (against 144,000 hectares in 2001 and 222,000 hectares in 2000). The resulting opium production (see figure 2) was estimated at about 4,500 metric tons (against 1,600 metric tons in 2001 and 4,700 metric tons in 2000).

25. In 2002 the relative distribution of illicit opium production among the main source countries (see figure 3) was as follows: Afghanistan (76 per cent), Myanmar (18 per cent), the Lao People's Democratic Republic (2 per cent) and Colombia (1 per cent). The remaining 3 per cent came from other countries (Mexico, Pakistan, Thailand, Viet Nam, etc.) where marginal production is reported.

Figure 1
Global opium poppy cultivation 1990-2002

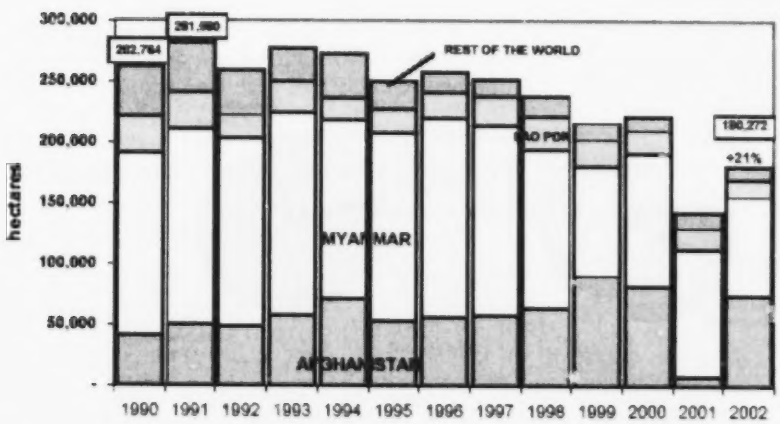


Figure 2
Global opium production 1990-2002

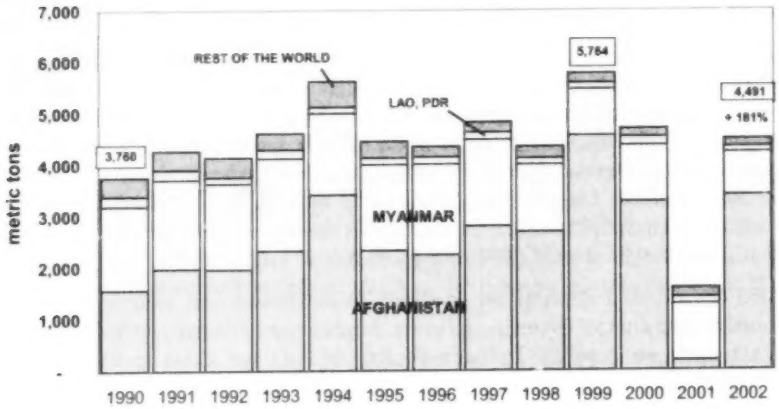
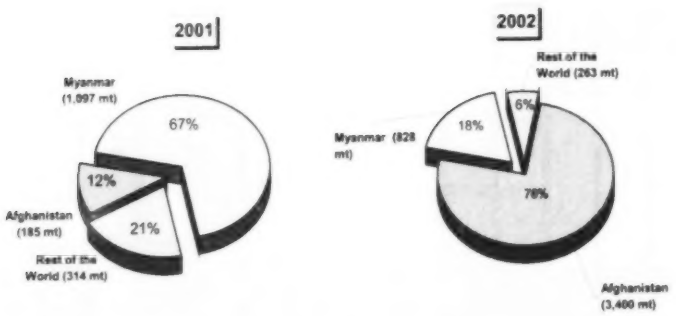


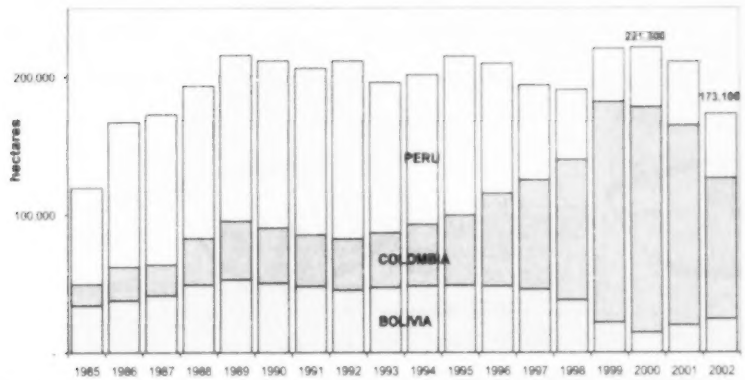
Figure 3
Opium production



2. Cocaine

26. For the second year in a row, illicit coca cultivation declined in Colombia. The 30 per cent reduction recorded between November 2001 (145,000 hectares) and December 2002 (102,000 hectares) translated into an 18 per cent decline in world illicit coca cultivation (from 211,000 hectares in 2001 to 173,000 hectares at the end of 2002) (see figure 4).

Figure 4
Global coca bush cultivation (1985-2002)



Estimates for Colombia for 1999 and subsequent years come from the national monitoring system established by the Colombian government with the support of UNODC. Estimates for 2000 refer to the level of cultivation in August 2000, estimates for 2001 refer to the level of cultivation in November 2001 and estimates for 2002 refer to the level of cultivation in December 2002. Due to the change of methodology, figures for 1999 and after cannot be directly compared with data from previous years.

27. Peru's illicit coca cultivation remained relatively stable during the year (52,500 hectares in 2002). In Bolivia, where cultivation had recorded a continuous decline between 1996 (48,100 hectares) and 2000 (14,600 hectares), cultivation increased for the second year in a row (by 23 per cent, to 24,400 hectares, in 2002).

28. The relative distribution of potential cocaine production among the three countries in 2002 was estimated as follows: Colombia 72 per cent, Peru 20 per cent and Bolivia 8 per cent (see figure 5 and figure 6).

Figure 5
Global potential cocaine production (1985-2002)

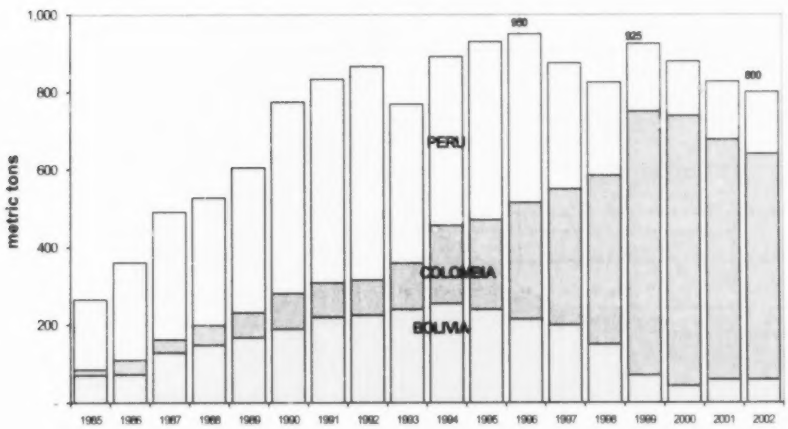
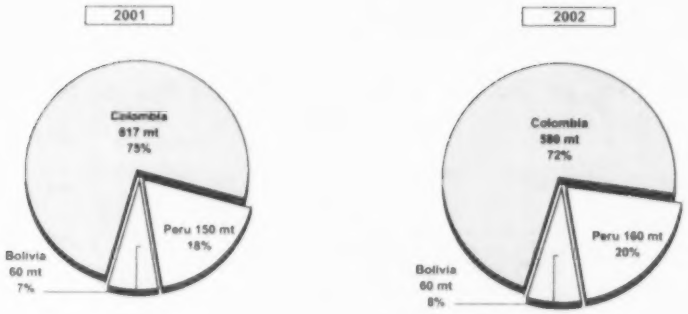


Figure 6
Potential cocaine production



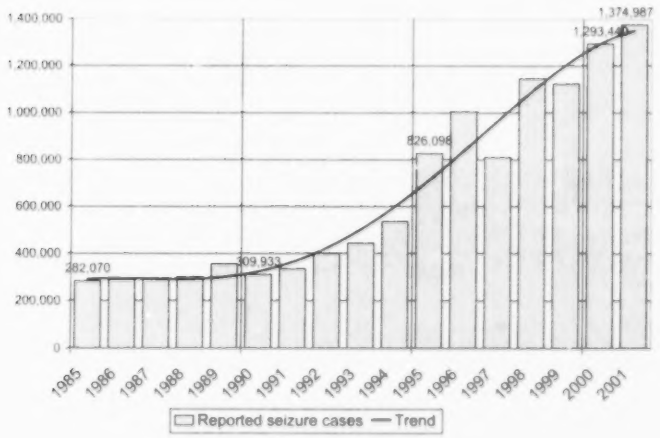
3. Cannabis and amphetamine-type stimulants

29. The lack of adequate data does not enable the United Nations Office on Drugs and Crime to precisely monitor trends in cannabis and synthetic drug production from year to year. However, indirect indicators suggest that global production of cannabis and amphetamine-type stimulants continued to increase in recent years, although regional variations could be observed.

B. Trafficking

30. Overall trafficking, as reflected in the number of seizure cases reported, continued growing in 2001, though at a slower pace than in the 1990s. The latest seizure data received from Member States in replies to the Annual Reports Questionnaire refer to the year 2001 (see figure 7 and figure 10).

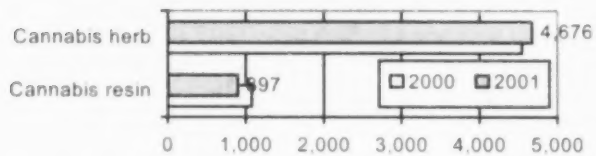
Figure 7
Global (reported) seizure cases (1985-2001)



1. Cannabis

31. The largest quantities seized worldwide were of cannabis herb, followed by cannabis resin. Seized quantities of cannabis remained stable in 2001. The largest cannabis herb seizures in 2001 were reported from Mexico; the largest cannabis resin seizures were made by Spain (see figure 8).

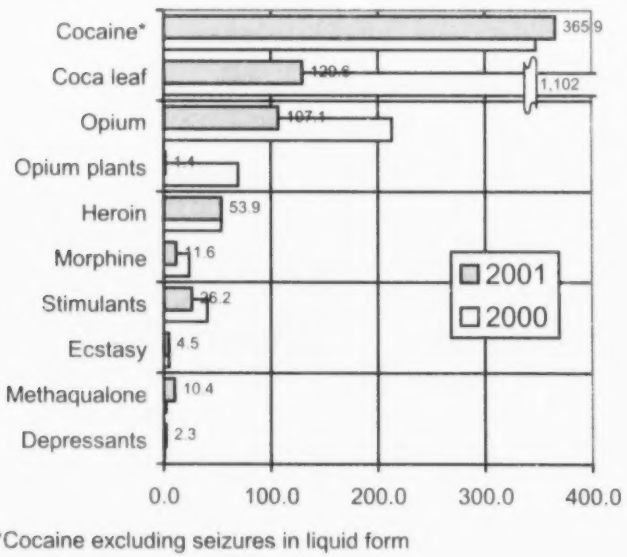
Figure 8
Global seizures in metric tons (based on weight equivalents) in 2000 and 2001



2. Cocaine

32. The third-largest quantities of drugs seized worldwide were of cocaine. They remained more or less stable in 2001. The largest cocaine seizures were reported from the United States of America, followed by Colombia (see figure 9).

Figure 9
Global seizures in metric tons (based on weight equivalents) in 2000 and 2001



*Cocaine excluding seizures in liquid form

3. Opiates

33. Overall, seizures of opiates declined by 23 per cent in 2001. The decline is attributed to the considerable decline of opium production in Afghanistan that year. Most opiate seizures (opium, morphine and heroin) continued to be made by the Islamic Republic of Iran. The largest seizures of heroin, however, were reported from China in 2001.

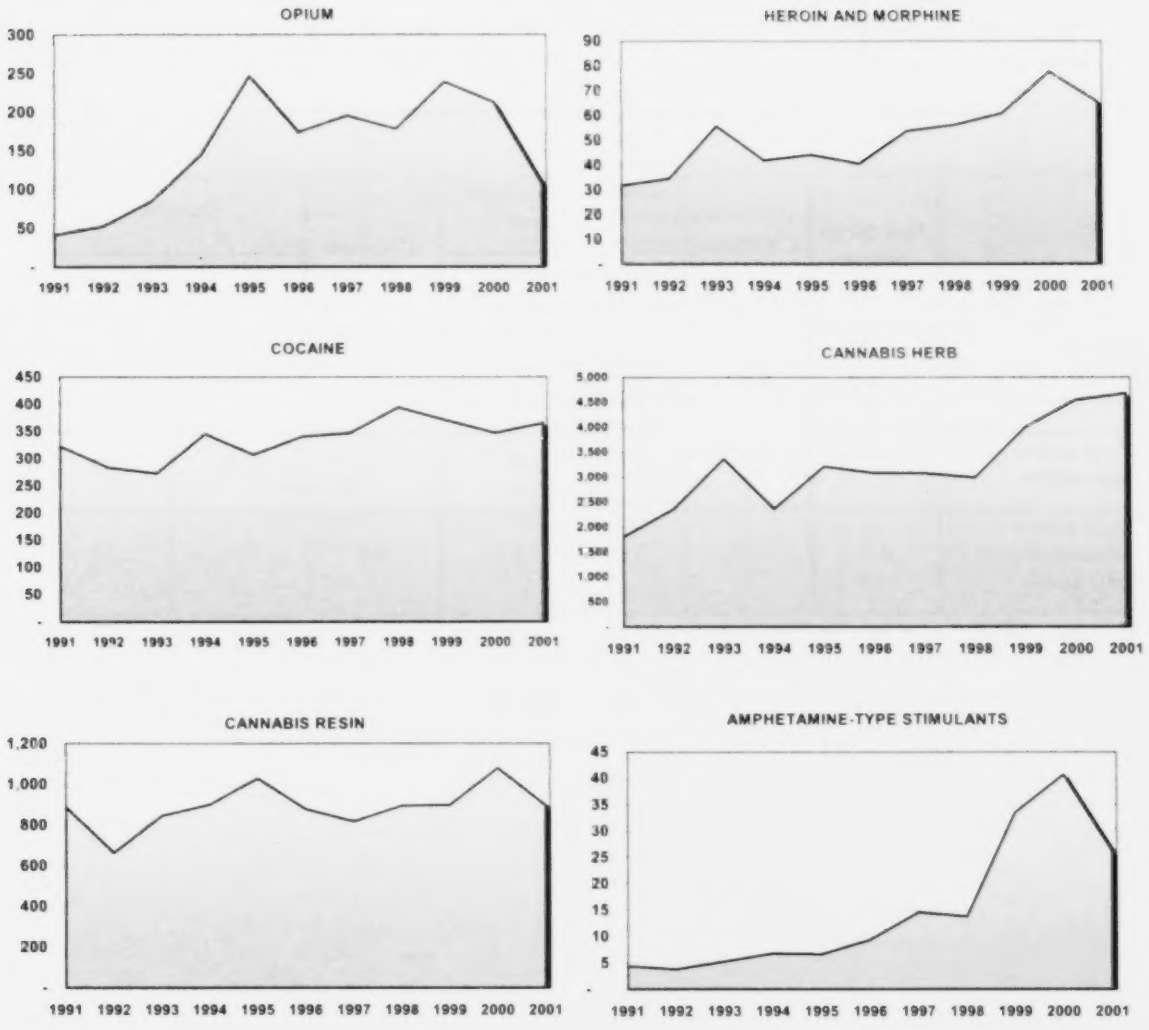
4. Amphetamine-type stimulants (excluding ecstasy)

34. Following years of massive growth, seizures of amphetamine-type stimulants (excluding ecstasy) fell in 2001 by 36 per cent. This decline was due mainly to lower methamphetamine seizures reported by China, which in recent years accounted for the bulk of such seizures. Nonetheless, global ATS seizures (excluding ecstasy) were still four times as high as in 1995 and eight times as high as in 1990. The largest ATS seizures in 2001 were reported from Thailand.

5. Ecstasy

35. Ecstasy seizures fell by about 10 per cent in 2001. Declines were recorded in a number of major markets, including the United States of America, Canada, the Netherlands, France and Italy. The largest ecstasy seizures were reported from the Netherlands, followed by the United States of America.

Figure 10
Trends in world seizures — 1991-2001
(in metric tons)



C. Consumption

36. The United Nations Office on Drugs and Crime estimates that about 200 million people consume illicit drugs (annual prevalence for 2000-2001). This includes about 163 million for cannabis, 34 million for amphetamines, 8 million for ecstasy, 14 million for cocaine and 15 million for opiates (of which 10 million for heroin). Because of multiple drug use, these numbers cumulatively exceed the total number of users. The numbers should be treated with considerable caution, given the large gaps in the prevalence data reported (see figure 11).

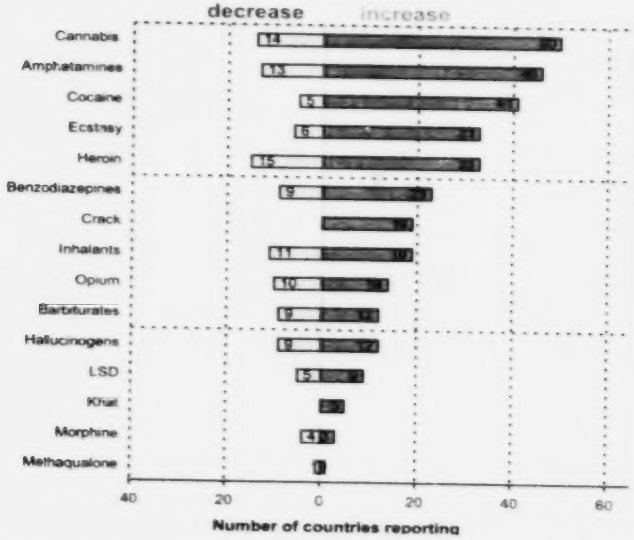
Figure 11
Extent of drug abuse (annual prevalence) — estimates 2000-2001

	Illicit drugs overall	Cannabis	Amphetamine-type stimulants		Cocaine	Opiates	
			Amphetamines	Ecstasy		Overall	Heroin
Global (millions of people)	200.0	162.8	34.3	7.7	14.1	14.9	9.5
% of global population	3.4	2.7	0.6	0.1	0.2	0.3	0.16
% of global population age 15 and above	4.7	3.9	0.8	0.2	0.3	0.4	0.22

Sources: UNDCP, Annual Reports Questionnaire data, various Government reports, reports of regional bodies, UNDCP estimates.

37. Reports indicate that, overall, the global drug problem continues to spread in geographical terms, as more countries reported increases rather than decreases in drug abuse (see figure 12). As in previous years, the strongest increase in abuse levels was for cannabis, followed by amphetamine-type stimulants. There are, however, indications that the rate of increase is slowing down, with the exception of ecstasy.

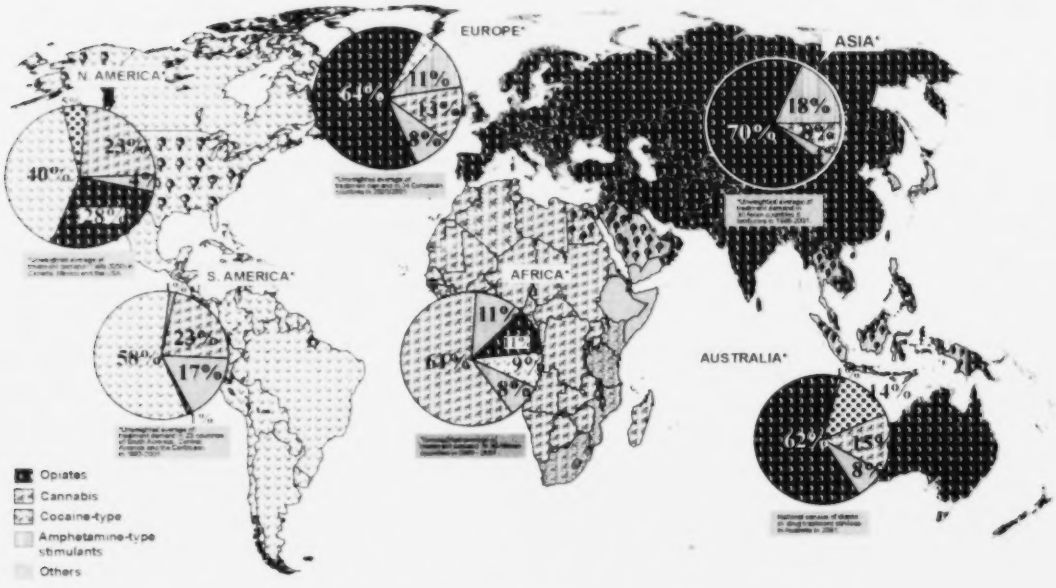
Figure 12
Global substance abuse trends: selected drugs in 2001 (based on information from 92 countries)



Source: UNODC, Annual Reports Questionnaire data.

38. The main problem drugs in the world, as reflected in demand for treatment, remained the opiates, followed by cocaine. In much of East and South-East Asia, ATS are the main problem drugs. In Africa, treatment demand continues to be concentrated on cannabis (see figure 13).

Figure 13
Main problem drugs (as reflected in treatment demand) in the late 1990s (updated in 2003)

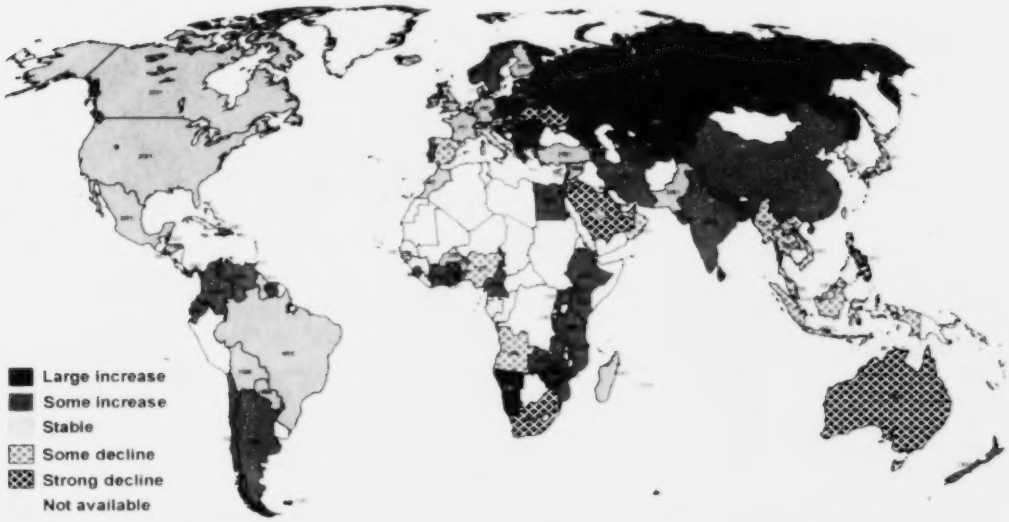


Sources: UNODC, Annual Reports Questionnaire Data/DELTA and National Government Reports.

1. Opium/heroin

39. Heroin abuse declined in East Asia, Oceania and Western Europe in 2001, but continued to increase in the countries located on the Afghan heroin-trafficking route towards the Russian Federation and Europe (see figure 14).

Figure 14
Changes in abuse of heroin and other opiates, 2001 (or latest year available)

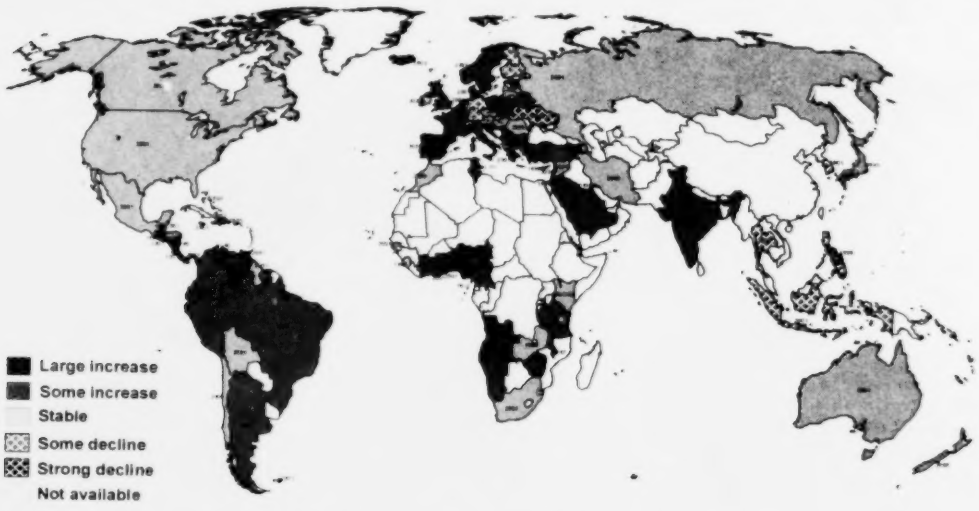


Sources: UNODC Annual Reports Questionnaires data. UNODC (Regional Centre Bangkok) Epidemiology Trends in Drug Trends in Asia (findings of the Asian Multicity Epidemiology Workgroup. National Household Surveys submitted to UNODC, United States Department of State (Bureau for International Narcotics and Law Enforcement Affairs) International Narcotics Control Strategy Report, Bundeskriminalamt (BKA) and other law enforcement reports, SACENDU (South African Community Epidemiology Network), UNODC, meetings of Heads of Law Enforcement Agencies (HONLEA), UNODC, Global Workshop on Drug Information Systems.

2. Cocaine

40. Cocaine abuse continued to increase in Western Europe and in South America, while it was stable in North America and fell among United States high-school students in 2001 (see figure 15).

Figure 15
Changes in abuse of cocaine, 2001 (or latest year available)

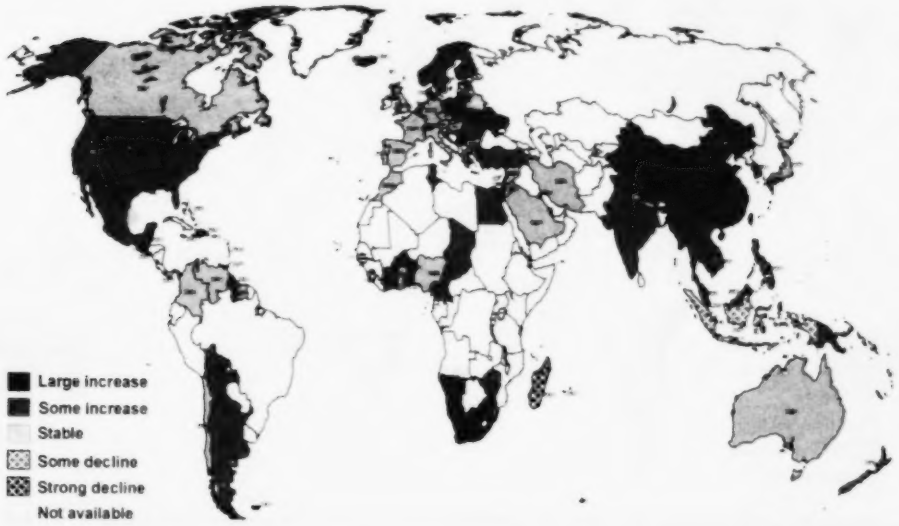


Sources: UNODC Annual Reports Questionnaires data. UNODC (Regional Centre Bangkok) Epidemiology Trends in Drug Trends in Asia (findings of the Asian Multicity Epidemiology Workgroup, December 1999, National Household Surveys submitted to UNODC, United States Department of State (Bureau for International Narcotics and Law Enforcement Affairs) International Narcotics Control Strategy Report, 1999, Bundeskriminalamt (BKA) and other law enforcement reports, SACENDU (South African Community Epidemiology Network) July-December 1998, UNODC and Ministerio de Educacion, Estudio Epidemiologico 1999, CEDRO, Epidemiologia de Drogas en la poblacion urbana Peruana — 1995, INCB, Annual Report for 1999.

3. Amphetamine-type stimulants (excluding ecstasy)

41. The methamphetamine epidemic appears to be continuing in South-East Asia, while abuse has stabilized in Japan. Amphetamine abuse stabilized in Western Europe, but continued to increase in Eastern and Northern Europe (see figure 16).

Figure 16
Changes in abuse of amphetamine-type stimulants (excluding ecstasy), 2001 (or latest year available)



Sources: UNODC Annual Reports Questionnaires data. UNODC (Regional Centre Bangkok) Epidemiology Trends in Drug Trends in Asia (findings of the Asian Multicity Epidemiology Workgroup, National Household Surveys submitted to UNODC, United States Department of State (Bureau for International Narcotics and Law Enforcement Affairs) International Narcotics Control Strategy Report, Bundeskriminalamt (BKA) and other law enforcement reports.

4. Ecstasy

42. Most countries reporting on ecstasy saw increasing levels of abuse (see figure 17).

Figure 17
Changes in abuse of ecstasy (MDA, MDEA, MDMA), 2001 (or latest year available)

Sources: UNODC Annual Reports Questionnaires data. UNODC (Regional Centre Bangkok) Epidemiology Trends in Drug Trends in Asia (findings of the Asian Multicity Epidemiology Workgroup, National Household Surveys submitted to UNODC, United States Department of State (Bureau for International Narcotics and Law Enforcement Affairs) International Narcotics Control Strategy Report; Bundeskriminalamt (BKA) and other law enforcement reports.

5. Cannabis

43. Cannabis abuse increased in Africa, South America, Europe and South-West Asia. Declines were recorded in Oceania and South-East Asia (see figure 18).

Figure 18
Changes in abuse of cannabis, 2001 (or latest year available)

Note: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the United Nations.